REQUEST FOR QUALIFICATIONS STATEMENTS FOR ARCHITECTURAL/ENGINEERING SERVICES FOR THE JOPLIN SENIOR CENTER (RFQ-2016-03)

FIRM NAME: BATES & ASSOCIATES, INC.
FIRM ADDRESS: 433 W. WALNUT ST.
SPRINGFIELD, MO 65806
FIRM TELEPHONE NUMBER: 417-865-2065
FEDERAL TAX ID NUMBER (EIN): 43-1853503
CONTACT PERSON: PAUL SABAL
PRINCIPAL-HEALTHCARE ARCHITECT
P: 314-863-2065
F: 314-863-8313
PS@BATESARCHITECTS.COM

bates

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INTRODUCTION (transmittal letter)

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Dear Selection Committee,

Upon our receipt and review of the RFQ for the Joplin Senior Citizen Center, RFQ-2016-03, Bates & Associates is pleased to submit our qualifications for your review. We are a veteran-owned business formed as a S Corporation with offices located in Springfield and St. Louis, Missouri and NW Arkansas (Rogers, Arkansas).

We fully understand the requirements set forth in the RFQ document and attest that the Bates Team can fully execute all necessary requirements including, but not limited to, Owner requirements, design & construction requirements, governing jurisdictional requirements including HUD, CDBG-DR and FEMA requirements, and all other necessary needs for the successful execution of the aforementioned project.

Our firm is licensed to practice Architecture in the State of Missouri. Our qualifications and references will attest to the standard of care we take in our process and commitment to total quality service. We are able to provide an exceptional standard of care because our senior leadership team has over 220 years of experience in the Design and Construction industry.

At Bates we have had a successful track record over the last five years with Mr. Steve Warlick as President & CEO. This track record has allowed Bates to open two new offices within that timeframe and expanded from eight to 56 employees. At Bates we strive to ensure that all work produced by our firm is of the highest ethical standard.

We understand that the entire contract for the services listed in the RFQ is within our scope and understanding. This includes all services performed directly by Bates and any services performed through us as the Prime by our consultants. We consider our consultants a direct part of our team and as such we have requested from them and included their experience as part of our overall team qualifications. Our consultants are targeted partners that we engage based on their expertise and competence in terms of quality of design, capacity for the work, and technical knowledge.

If you have questions, would like additional information, or need to discuss any information we have provided, please feel free to contact me directly anytime.

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The first, true 21st century Architecture Firm leading the world in Design, Technology, and Culture.

Respectfully Submitted,

Ryan Faust
Principal-Architect

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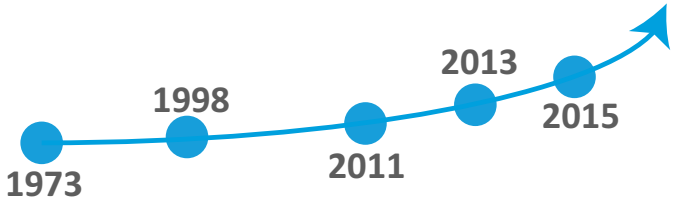
COMPANY PROFILE

SPRINGFIELD HEADQUARTERS
433 W. WALNUT ST.
SPRINGFIELD, MO 65806
O: 417-865-2065
F: 417-865-8313
bh@batesarchitects.com

ST. LOUIS OFFICE
225 S. MERAMEC, SUITE 832T
CLAYTON, MO 63105
O: 314-863-2065
F: 314-863-8313
ps@batesarchitects.com

NW ARKANSAS OFFICE
106 N. 37TH ST, SUITE C
ROGERS, AR 72756
O: 479-633-8155
F: 417-865-8313
rf@batesarchitects.com

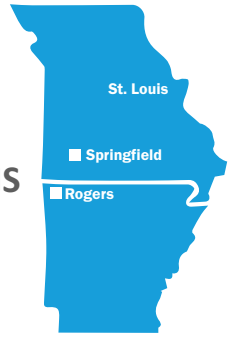
ABOUT bates



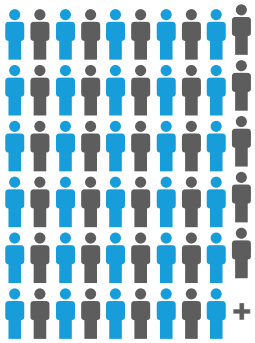
43 YEARS IN BUSINESS
ESTABLISHED IN 1973

1973 Warren Bates President
1998 Alan Bates President
2011 Steven Warlick President
2013 St. Louis office
2015 Rogers office

3 LOCATIONS



50+ EMPLOYEES





BATES IS PROUD TO BE A
VETERAN OWNED
SMALL BUSINESS

ARCHITECTURE
MASTER PLANNING
INTERIOR DESIGN
ENGINEERING TECHNOLOGIES



Bates has been at the forefront of outstanding design for over forty years. Our success is measured by our continued client relationships, and by using creative thinking to meet and exceed our client's project requirements.
We accomplish this by:
* Listening to our clients needs.
* Assimilating information from our clients.
* Developing solutions through design.
* Transforming design into the built environment.
We envision our client's needs to help facilitate a more profitable, successful future. We believe the power of planning and design improves people's experiences, their communities, and their environment by using expertise, creativity, and technology.

bates



Bates was established in 1973 in the state of Missouri of the United States of America as Bates & Associates, Inc. and has operated under that name since its opening. Original founder Warren Bates handed the firm onto his son Alan Bates in 1998. In 1998 when Alan passed Steve Warlick became sole owner of Bates & Associates and has been the CEO since that time.

The firm is setup as an S Corporation in the State of Missouri. We have one sister company, BatesENG, which is an engineering technology company formed in 2014 that develops data content for Bates digital building models. Bates has three office locations, the primary office location for this project is the Springfield, Missouri office under the firm's Chater Number 00470615. Principal-Architect for the Project is Paul Sabal, license # 2002002781, and the project Manager is Bo Hagerman, Director of Design. Bo is a licensed Architect, license # 2006035990, in the State of Missouri and also a Principal in the firm.

Our ability to provide our services in reference to Earned Value Management Principles is through a collaborative approach that includes community members, end users, and outside influences to form a balancd understanding of the needs of each project. This process is built on four foundational platforms:



1. PLANNING:

Experience and following industry standards allows us to anticipate the steps required to formalize a project delivery process. Open dialog allows team members to understand each other's values, capabilities, roles and responsibilities. We have an initial strategy and planning period to formalize the collaborative process. The outcome is a Project Implementation Plan that proceeds from the strategic vision into the programming process. This directs design, construction and operational occupancy.

2. STAFFING:

Proper staffing guarantees that the right talent and capabilities are in place for the required project goals. This requires recognizing the capabilities of the client, identifying the special capabilities needed at critical junctures and understanding when the introduction of an experienced consultant is necessary. Bates takes a proactive approach to staffing, rather than a reactive one; what this means is that we strive to eliminate any staffing concerns before they actually become issues. Appropriate staffing will require that we understand your current capabilities and needs up front. Once this has been established, we can then assign all suitable entities to the project.

3. SCHEDULING/MONITORING:

Scheduling is a disciplined series of systematic processes that is formalized and requires the commitment of all participants to meet their determined goals. Time needed for planning and design, RFQ development, communicating bid requirements, construction, commissioning and jurisdictional documenting all must be budgeted. Bates monitors progress according to the predetermined schedule to ensure each step is consistent with the overall project plan.

4. SYSTEMATIC COMMUNICATION:

The planning, implementation, and achievement of goals is an essential role of the project management team. Structuring the network, meeting the needs and expectations of clients/users and communicating with everyone involved in the project are all duties that make up this monumental task. Possessing the proper experience and knowledge is crucial to successfully executing these duties.

EXAMPLES OF EARNED VALUE MANAGEMENT PRINCIPLES

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(*items in parentheses are edited for client confidentiality.)

Meeting Minutes

Date: December 28, 2015

Project: (Multi-Unit Lodge Facility)

Attendees: (Client Names), Bo Hagerman, Dusty Emmert, Jason Gundy

Subject: Project Kickoff Meeting

Meeting Overview:

A meeting was held at the (project site) at 11:30 am.

Action Items:

No.	Description	Responsibility	By Date	Date Completed
1	Geotechnical Investigation	(Client)		
2	3rd Party Inspector on Board	(Client)		
3	Program for Amenities	(Client)/Bates		
4	Program for Sales	(Client)/Bates		
5	Program for Support Spaces	(Client)		
6	Verify Total Number of Units (245 or 249)	(Client)		
7	Confirm Taney County Requirements	Bates		
8	Site Master Plan Design Approval	Bates/(Client)		
9	Construction Schedule	LSC		

Permitting:

- Civil Engineer to verify Land Use, Zoning and Site Allowance for Unit Density.
- DNR Land Disturbance Permit – Civil Engineer/LSC
- DNR WWTP Expansion Permit. Timeline is 6 to 12 months after construction documents are complete – Civil Engineer
- Utility Easement Relocation – Civil Engineer
- (County) Specific Planning - Bates
- (County) Fire Protection District – Bates

Pre-Construction Manager:

- Integrated project delivery.
- Pre-Construction Manager is a consultant and resource to be utilized.
- LSC to use Sage Timberline software as estimating/bidding tool.
- LSC lead estimator is Josh Stringer.
- LSC project manager to be determined.
- Design phases will be estimated at 30/60/90% completion.

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- LSC will work w/ (Client) 3rd party estimator. (Client) to provide contact information to LSC.
- LSC to provide a comprehensive construction schedule based on the project schedule provided by (Client)
- This project will be fast tracked w/ site package provided as a critical path.
- LSC has provided an estimate for early completion of the 2nd and 3rd phases.
- Construction entrance will be separate from the resort's main entrance to avoid damaging existing conditions. A location to be provided for approval.
- LSC to proceed w/ product research for cost comparison of proposed exterior and interior materials. Product samples to be provided.

Development Schedule:

- A proposed development schedule provided by (Client) was discussed.
- LSC to provide a comprehensive construction schedule based on the development schedule provided by (Client).

Design Topics:

- (Client) to verify number of units (245 units or 249 units).
- The (2) units on the 3rd floor will be removed bringing Phase 1 and Phase 2 unit count from 74 to 72 units.
- Programming requirements to be provided by (Client):
    - Sales Center Requirements and Design
    - Overall Unit Count
    - Support Spaces, Locations and Square Footages - (Client) to provide requirements based on (previous projects) program.
    - Maintenance building program and square footage to be provided by (Client).
    - Lodge / Budget
    - Amenities / Budget
    - Budget is based on (previous project) Building 9.
- (County) Ordinance: 70'-0" Mean Roof Height from Base Plane. Bates to confirm building meets requirements.
- Site Master Plan to be designed for all 4 phases (utilities, drives, parking, etc.)
- Amenities to be provided at the end of phase 2.
- Provide screening of the waste water treatment plan after expansion.
- Existing entry to the site is to remain.

Site Utilities:

- WWTP expansion to be designed for all 4 phases and the entire master plan during Phase 1.
- WWTP expansion to be designed to accommodate (project name) Campground. A separate proposal from the Civil Engineer will be provided and billed directly to (Client). Does this work come from this projects construction budget?
- Utility easement will be relocated to accommodate the new buildings. New easement location will need to be determined and borings will need to take place at the new proposed easement location. This is a critical path item.
- Site water capacity and pressure to be investigated.

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Design Team:

- MEP Engineer – Colvin Jones Davis
- Structural Engineer – Wells & Scaletty
- Civil Engineer – Olsson Associates (Proposal Pending)
- Landscape Architect – SWT (Proposal Pending)
- Interior Designer – Chase Collaborative (Proposal Pending)
- Bates to provide project directory of consultants.
- Bates/Project Team to use A360. Bates to set up A360 and email team for instructions.
- Bates to prioritize bringing Civil Engineer and Landscape Architect on board.

Geotechnical and Threshold Inspections:

- (Client)will get proposal from Palmerton & Parrish for both geotech and 3rd party inspections.
- Bates, LSC, Wells & Scaletty to schedule meeting to identify boring locations.

General Topics:

- (Client) to provide a program book checklist for sign-off from all parties involved.
- Owner review will be done at 30%, 60% & 90% completion of design phases (Schematic Design, Design Development, Construction Documents)
- A presentation for (Governing Agency) will be given at the end of both Schematic Design and Design Development.
- A presentation for (Client) will be given at the end of Both Schematic Design and Design Development.
- Early completion of construction phases was discussed. Possible savings on general conditions. Inventory and cash flow dictates completion dates of construction phases.
- Potential lead time items such as steel, precast, etc. to be identified and addressed so not to delay construction.
- This project was budgeted off (previous project) Building 9.
- A preconstruction meeting is to be scheduled.
- A periodic progress meeting to be scheduled between all parties.
- (Client) fabrication shop to be utilized as a resource as much as possible for handrails, light fixtures, ornamental medals, etc.
- (Client) has a contact that should be utilized for economical leaded glass.
- (Client) has a contact that should be utilized for reclaimed wood.
- Phases 1 and 2 will be 72 Units.
- An entrance feature design will be investigated.
- The width of the breezeways to be reduced w/ 6'-0" as a minimum.
- A public waste water treatment plan is being investigated by the county.
- Bates and LSC to schedule a lessons learned meeting for building systems and design that are similar to (previous project) Building 9.

Please notify us of any points of discussion that have been omitted inadvertently or recorded incorrectly in these minutes. If we do not hear from you within seven days, these minutes will be assumed to be correct.

Bates & Associates Architects

(*items in parentheses are edited for client confidentiality.)

(Multi-Unit Lodge Facility) Cost Study

March 1, 2016

Comparison of (Multi-Unit Lodge Facility) to (Previous Project) Building 9

Precast floor slabs, concrete block bearing walls.

(Multi-Unit Lodge Facility) SQ FT's		**(Previous Project) Building 9 SQ FT'S**	
Lower Level:	28,165	First Floor	33,238
Entry Floor:	26,573	Second Floor	30,148
Second Floor:	24,242	Third Floor	26,287
Third Floor:	24,242	Fourth Floor	26,287
Fourth Floor:	26,573	Fourth Floor Loft	9,156
Fifth Floor:	18,040		
Total:	147,835 SF	Total	125,116 SF

(Previous Project) Building 9 Cost per SQ FT

125,116 SF x $171.49 = $21,455,529

Escalation Cost: 10% 10% x $171.49 = 17.15 + 171.49 = $189

(Multi-Unit Lodge Facility) Estimated Cost per SQFT (with 10% escalation cost)

$189 x 147,835sf = $27,940,815

(Multi-Unit Lodge Facility) Cost Study

Total Cost for Project

Total Building Cost	$27,940,815
Amenities Cost	$1,000,000
Site Cost	$1,024,713
Total Construction Cost:	**$29,965,528**

ORGANIZATIONAL STRUCTURE

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PROJECT ORGANIZATION CHART

PRESIDENT & CEO
Steve Warlick
AIA, NCARB, LEED AP

PRINCIPAL IN CHARGE
Paul Sabal - Principal / Healthcare Architect
Paul will be the Principal in charge directing team movements and oversight of the project progress and development. All aspects of the scope of work (items 1 through 5) will be under Paul's supervision.

PROJECT MANAGER
Bo Hagerman - Director of Design
Bo will directly manage items 2 and 4 on the scope of work. All architectural and engineering disciplines and coordination will be directed by Bo and reporting for CDBG-DR will be funneled through Bo as the Project Manager.

CONSTRUCTION MANAGER
Jordan Ligon - Project Manager

Jordan is the project manager for construction activities in regards to item 5 on the scope of work. Jordan will report directly to Bo for all RFQs, RFPs, construction inspections and other construction management activities.

CIVIL ENGINEER
Nate Bachelor -
Project Manager

Nate is the project manager for civil engineering design in regards to item 2 on the scope of work. Nate will report directly to Bo for all civil related items including utilities, land development, grading, stormwater design, and landscape architecture.

MEP ENGINEER
Ken Overman - Project Manager

Ken is the project manager for MEP engineering design in regards to item 2 on the scope of work. Ken will report directly to Bo for all MEP related items including mechanical, electrical, fire protection, plumbing, security and low-voltage systems.

CONSTRUCTION MANAGEMENT

HART | CONE CONSTRUCTION

CIVIL/LANDSCAPE ARCHITECTS

CEI®

MEP ENGINEERS

Omni ENGINEERS

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PAUL SABAL

AIA, NCARB, LEED-AP, ASHE, MOSHE
PRINCIPAL-HEALTHCARE ARCHITECT

ps@batesarchitects.com

EDUCATION

University of Oregon:
Bachelor of Architecture 1981

REGISTRATIONS

Registered Architect - Missouri & Texas
LEED AP

PROFESSIONAL ORGANIZATIONS

American Institute of Architects
Academy of Architecture for Health
American Society of Healthcare Engineers (Past Education Taskforce Member)
Missouri Society of Healthcare Engineers (Education Committee Co-Chair)
National Council of Architectural Registration Boards

ABOUT PAUL

Paul Sabal is a registered architect/interior designer with extensive knowledge of and involvement in all aspects of healthcare design and construction, from initial land and facility planning through design and construction administration. Paul's distinguished career is marked by unwavering client commitment and hands-on project involvement.

As a manager, principal and owner of architectural firms, Paul has a well-rounded perspective and offers sales, marketing and presentation expertise to his clients. An authority on healthcare design, trends and best practices, Paul maintains current industry knowledge regarding regulation, legislation and reimbursements. He has been a contributor to healthcare security panels and presentations for healthcare disaster preparedness.

RELEVANT PROJECT EXPERIENCE

Parkside Retirement Living - St. Charles, MO
As the first project implemented from their master plan, Parkside converted a portion of their Residential Living Facility into a 17 unit assisted living Memory Care Home. The design of the facility followed the "neighborhood" concept. Activities and meals are focused around the hearth room and dedicated kitchen. This home-like setting helps residents to connect with memories by encouraging social interaction and physical activity, and by providing residents opportunities to participate in the activities of daily life.

Parkside Retirement Living - St. Charles, MO
Parkside Retirement Living operates a 263 unit CCRC on the North side of downtown St. Charles, MO. In a joint effort with HBD and Gray Design Group, we performed a thorough inventory of all living units, their amenities and physical conditions. With a goal of providing more appropriate levels of care for the residents of Parkside, we used our base information to develop a phased master plan that redistributed the number of units between levels of care. As part of the master plan we developed upgrade, finish, and new design strategies to make the existing units more competitive with other providers in the area. Finally, we relocated and redesigned all the resident amenity and staff support areas, to align activities with appropriate levels of resident care.

Chesterfield Senior Care - St. Louis, MO
Assisted Living and Independent Living Facilities

Brookdale Senior Living
The Hallmark of Creve Coeur, Creve Coeur, MO
Hallmark of Creve Coeur Assisted Living Apartments - Creve Coeur, MO

Lutheran Senior Services
Meramec Bluffs Retirement Community - St. Louis County, MO
Meramec Bluffs Assisted & Skilled Living - St. Louis County, MO

*Projects completed while with another firm

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BO HAGERMAN

AIA, ASHE, NCARB, ULI, NAHRO
DIRECTOR OF DESIGN

bh@batesarchitects.com

EDUCATION

Kansas State University:
Bachelor of Architecture,
Bachelor of Science, Business Administration 1998

REGISTRATIONS

Registered Architect - Missouri & Illinois
NCARB
Fellow Health Facilities Institute

PROFESSIONAL ORGANIZATIONS

KSU Professional Advisory Board
2014 St. Louis Regional Permitting Collaborative - AIA Representative
American Institute of Architects President 2012; Board Member 1997-2004; Treasurer 1997-1998; Director 1999-2004
2003-2007 AIA Missouri Director
2008 to Present - AGC of St. Louis, Construction Alliance Committee
2014 - Construction Forum St. Louis
Director
2001 - Missouri APPA Conference Presenter
Fall 1999 - FOCUS St. Louis Leadership Program

ABOUT BO

Bo offers a creative perspective on architectural design, working both as a professional artist and designer. He has studied extensively both art and architecture in Europe and the United States and has developed a unique appreciation of modern and historical buildings and their relationship to the built and natural environment.

Few people are able to combine the creative, technical and business sides of the profession and make them work together as Bo does. He has studied extensively both art and architecture in Europe and the United State and has developed a unique appreciation of modern and historical buildings and their relationship to the built and natural environment.

RELEVANT PROJECT EXPERIENCE

Vandivort Hotel - Springfield, MO

Central Bible College - Springfield, MO*
Master Plan, Student Housing Development, Men's Dorm

Cox North Hospital - Springfield, MO*
Psychiatric Study, Psychiatric Ward Remodel, Burrell Behavioral Health Expansion

Cox Walnut Lawn - Springfield, MO*
Therapy Area, Outdoor Rehab Area

Physicians Advanced Healthcare Physical Therapy – Springfield, MO*

Deep Elm Apartments - Springfield, MO

Paradise Point Condominiums, Bluegreen Resorts - Hollister, MO

Brew Co. Lofts - Springfield, MO

Bear Village Apartments - Springfield, MO

1144 East Walnut Apartments - Springfield, MO

Big Cedar Lodge Renovation - Ridgedale, MO

Chesterfield Village Condos - Springfield, MO

Diffenderffer Lofts - Springfield, MO

Falls Village - Branson, MO

*Projects completed while with another firm

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STEVE WARLICK

AIA, NCARB, LEED AP
PRESIDENT & CEO

sww@batesarchitects.com

EDUCATION

Drury University:
Bachelor of Architecture 1999

REGISTRATIONS

Registered Architect -
Arkansas, Florida, Illinois, Kansas, Missouri & Oklahoma
LEED AP

PROFESSIONAL ORGANIZATIONS

American Institute of Architects (AIA)
National Council of Architectural Registration Boards (NCARB)
United States Green Building Council (USGBC)
National Restaurant Association Member
Community Improvement District
National Trust for Historic Preservation

ABOUT STEVE

Steve Warlick, AIA, NCARB, LEED AP is the President and CEO of Bates & Associates, Architects and a lead designer for the firm. He is also be personally involved in projects from the initial stages of design to the final punch-list. Steve began his education at Missouri State University after ten years of construction experience and five years of military service. He later graduated from Drury University with a degree in Architecture and has been with Bates & Associates since graduating in 1999.

Steve's accreditation of LEED AP will assist in employment of sustainability ideals, striving to balance initial cost of building components with the complete life-cycle cost and the resulting paybacks associated with each project. Steven Warlick joined Warren and Alan Bates at Bates & Associates, Architects in September, 1999. Steven became president and CEO of Bates & Associates in 2011. As President and CEO of Bates & Associates, Steven oversees all architecture and master planning in both the Springfield and St. Louis offices. The St. Louis office was opened under Steven's leadership in 2012.

RELEVANT PROJECT EXPERIENCE

Foster Health Care Assisted Living Branson Meadows – Branson, MO

Foster Health Care Chesterfield Assisted Living Facility – Springfield, MO

Physicians Advanced Healthcare - Poplar Bluff, MO
Ambulatory Surgery Center Medical Office Building, Physical Therapy, Doctor's Offices, Internal Medicine, Pharmacy, Sleep Lab, Visiting Physician's Clinic, and Specialty Physicians Clinic – Poplar Bluff, MO

Cox Freeman Medical Office Building – Springfield, MO
Cox Health Systems Meyer Orthopedic Center, Cox Walnut Lawn Ambulatory, Outpatient Recovery, Outdoor Rehab Area, Therapy Area - Springfield, MO

Cox North Hospital - Springfield, MO
Master Plan, Women's Center, Emergency Room/Triage, Pediatrics, Lab and Toxicology, Radiology/Mammography, Radiology, Senior Health, Pain Management, Dual Diagnosis, Psych Unit, Rehab Unit, Bio Med Storage, Detox, Long Term Acute Care Unit, Pharmacy.

Mercy - Various Locations
Pediatric Surgery, 6-D Patient Room Remodel, Urgent Care, Aurora Isolation Room, CV Echo Reading Room, Mt. View Hospice, GI Lab, Smith Glynn Callaway Clinic Masterplan, Radiology, ROi Consolidated Services Center, Oncology OIC, and Heart and Vascular Hospital

EXPERIENCE AND QUALIFICATIONS

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PRIMROSE SENIOR LIVING FACILITY

Preparing for construction this facility will be a One-Story, 120 bed, Skilled Nursing Facility located in Springfield, Missouri. With a total square footage ranging from 60,000-70,000sf, Primrose will boast multiple office spaces, conference rooms, a therapy gym, beauty shop, main and private dining rooms, maintenence and storage facilities, as well as activity and dayspaces.

To target specific needs to Primrose, Bates will also include space for a Memory Care Unit that provides 20-22 rooms. Within the facility, private rooms will make up 40-50% of the total room count. By exploring "Green" alternatives, Bates will provide Primrose Senior Living with multiple energy saving features.



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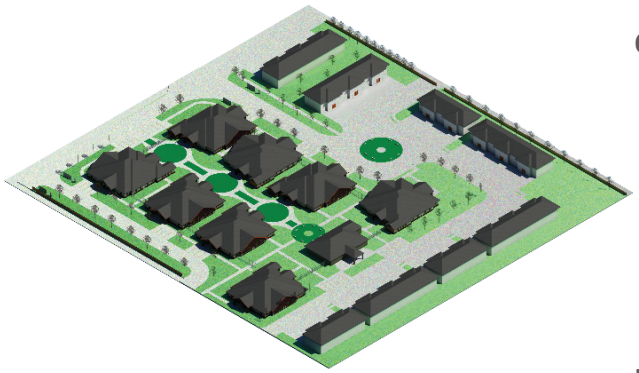
65 MARKETPLACE

The 11.96 acre site plan for the 65 Marketplace development will include skilled nursing facilities, independent living, and office space. The main entrance to the site occurs at N 15th Street with secondary access from W James River Road and N Farmer Branch Road in Springfiled, MO. The skilled nursing has a garden that creates significant green space for relaxation, activities and therapy. Parking is minimized in front of the skilled facilities with employee parking located at the east entrance.

Site divided into 3 lots:

60,800 sf of skilled nursing facilities
13,401 sf of office space
25,224 sf of independent living



Skilled Nursing Site:

Encompasses the central southern portion of site
80 skilled nursing beds
8 skilled nursing buildings (10 beds per building)
Bisymmetrical plan with community garden axis
4,000 square foot administration building
Admin building provides hub for maintenance, clerical and administrative duties.

Office Space Site:

Located in southwest corner of site
Entrance connected to Price Cutter parking lot allowing mutual benefit of adjacent business.
Provides space for an on-site MD and/or other tenants that may contribute to day-to-day activ ities in the skilled nursing and independent living community

Independent Living Site:

Located along northwest border of buildable site
30 units (2 bedroom/2 bath)
800 square feet per unit
6 buildings (3 four-plexes and 3 six-plexes)
Each unit has driveway with 2-car carport
Layout alternates between four and six-plexes to create undulation of scale and remove institti on al quality of identical buildings.

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BROOKDALE SENIOR LIVING

Assisted Living apartments are available as part of a Continuum of Care offered at the new Hallmark senior housing community providing both independent and assisted living in a well planned leisure environment. Chicago-based Brookdale Living Communities' first project for the St. Louis area market confirmed their tradition of exceptional senior living.

The Assisted Living area offers 40 assisted living units, an intimate dining and living setting, along with home health care offices and nicely appointed activities area for more frail long term senior residents. It shares adjacent wellness and therapy areas with the remainder of the building.

DETAILS

- Senior living facility providing both independent & asisted living
- Traditionally detailed interiors
- Full masonry building
- Includes 178 independent living Units / 40 assisted living units
- Amenities include:
  - exercise room
  - activities room
  - beauty shop
  - pool
  - lake / fountain
  - walking trails

* Experience of Paul Sabal while employed at previous firm

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VANDIVORT HOTEL

Hotel Vandivort is an upscale independent boutique hotel and is the first centrally located hotel in the heart of downtown Springfield, Missouri. This project included a complete restoration of the historic and original Masonic Temple that was over 100 years old. Hotel Vandivort features 50 rooms, two high-design meeting and entertainment spaces on the Lobby Level and a historic Grand Ballroom located on the 4th Floor. Bates successfully navigated the historical jurisdictional requirements set forth for the project, and as part of the already-thriving revitalization movement in downtown Springfield, Hotel Vandivort achieved LEED Gold Sustainability Certification. Vandivort's Grand Opening took place in July 2015.





CHADWICK PUBLIC SCHOOLS FEMA SHELTER

Chadwick School District selected Bo Hagerman, at then Hagerman New Urbanism to design their FEMA Storm Shelter and a 5,000 square foot addition. The FEMA funded construction included a gymnasium, library, and a classroom building. The classroom building was designed to be used daily as normal classrooms but then could be converted into the FEMA storm shelter at a moment's notice.

This project also included a new entrance and welcome center for the school district that served as a part of the FEMA Storm Shelter as well. The community access the entrance and welcome center for various Chadwick athletic events and therefore are familiar with the facility in the event that the FEMA Storm Shelter would need to be accessed for shelter purposes

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MULTIFAMILY SENIOR HOUSING & MIXED-USE DEVELOPMENTS COMPLETE PROJECT LIST

Sparta Housing F.M.H.A. Senior Citizens, Sparta, MO
Clever Senior Citizen Housing, Clever, MO
Ash Grove Senior Citizen Housing, Ash Grove, MO
Nixa Senior Citizen Housing, Nixa, MO
Cox North Hospital Senior Health, Springfield, MO
Cox Medical Office Building South Senior Health, Springfield, MO
Chesterfield Senior Care, St. Louis, MO
65 Marketplace Skilled Nursing & Independent Living, Ozark, MO
Assisted Living, Independent Living, and Skilled Living Facility, Belleville IL*
University City Skilled Nursing Care-Planning Study for Adaptive Reuse, University City, MO*
The Freemont Senior Living Center, Springfield, MO
Primrose Senior Living & Skilled Nursing Facility, Springfield, MO
Joplin Skilled Nursing Facility, Joplin, MO
Mercy Villa Skilled Nursing, Springfield, MO
Brookdale Senior Living, The Hallmark of Creve Coeur, Creve Coeur, MO
Brookdale Senior Living, Hallmark of Creve Coeur Assisted Living Apartments, Creve Coeur, MO
Lutheran Senior Services, Meramec Bluffs Continuing Care Retirement Community, St. Louis, MO
Lutheran Senior Services, Meramec Bluffs Assisted & Skilled Living, St. Louis County, MO
Parkside Retirement Living Memory Care, St. Charles, MO
Parkside Retirement Living Facility Master Plan, St. Charles, MO









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CAPACITY

The Bates team listed below is setup to handle current and projected workload to meet the schedule demand of the RFQ. In the past year Bates has completed 88 projects in market sectors of healthcare, housing, education, retail, commercial, historical rehabilitation, and hospitality. Our services include master planning on large scale community projects, complex healthcare architecture, fast-paced multi-site retail, interior design solutions for tenants in a lease space and now facilities management of operations and maintenance.

Including all of our project types we have worked in various jurisdictions of all levels (city, state, and federal) throughout the country, and are extremely in-tune with regulations and standards for the Design & Construction industry for federally funded projects and senior housing project types. Our teams work diligently to cover all aspects of regulatory compliance from jurisdictions, stakeholders, and end users.

Our team is comprised of talented and dedicated administrators, architects, interior designers, technology experts, and support staff who have been assembled to form an expert and exclusive best design practice. We offer the best of a large architectural firm - having numerous staff, continued growth and technical proficiency, and a small firm with access to clients, three centralized Midwest locations, and quality service. We have several staff members in our Missouri and Arkansas locations who are recognized in their communities as leaders in the design industry.

Bates uses many different types of consultants on a majority of our projects as an extension of our team. We require and challenge they share in the Bates promise of **total quality service**.

ADMINISTRATORS (7)

- Steve Warlick, President/CEO
- Todd Jacobs, Principal/COO
- Bo Hagerman, Director of Design
- Jerry Hagerman, Director of Architecture
- Paul Sabal, Principal/Healthcare Architect
- Ryan Faust, Principal Architect
- Chris Gale, Principal Architect

ARCHITECTS (15)

- Phil Young, Director of Operations/Senior Architect
- Valmik Thakore, Director of Healthcare
- Diane Adler, Senior Healthcare Planner
- Joe Bauer, Project Manager/Senior Architect
- Kent Norwood, Project Manager/Senior Architect
- Larry Wolters, Project Manager/Senior Architect
- Andrew York , Project Manager/Architect
- Jason Gundy, Project Manager
- David Horst, Project Manager
- RG Foster, Senior Architect
- Walt Albrecht, Senior Architect
- Carl Karlen, Architect/Designer
- Mark Tuttle, Architect/Designer
- Cliff Collins, Architect
- Bryan Stockton, Architect

INTERIOR DESIGNERS (4)

- Ali Summerford, Director of Interior Design
- Jaime Doerr, Interior Designer
- Crystal Smith, Interior Designer
- Keaton Tyler, Interior Design Intern

DESIGN PROFESSIONALS / PLANNERS (20)

- Alan Macejewski
- Alex Carter
- Alva Trask
- Chris Billo
- Christophe Bouteille
- Christopher Grimm
- Emily Biagioni-Paulette
- Eric Motley
- Erin Sikorski
- Golie Ebrahimian
- Joel Thomas
- Kirsten Goedecke
- Megan Eli
- Rich Conyers
- Ryan Daniels
- Suzanne Hayes
- Tanya Chadha
- Tian (Albert) Wang
- Timothy Brandt
- Rod Smith, Construction Supervisor

TECHNOLOGY (3)

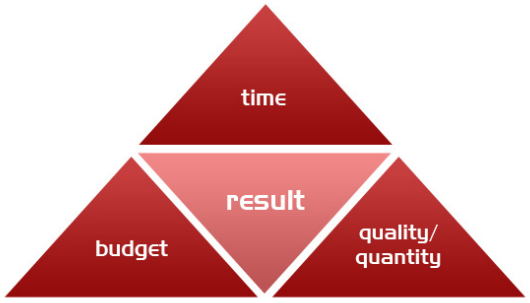
- Marin Pastar, Director of Technology Innovation
- Aaron Gipperich, BIM Manager
- Kirk Simpson, Information Technology

SUPPORT STAFF (3)

- Jennifer Hintz, Office Manager/Marketing
- Lindsey Houser, Executive Assistant
- Angie King, Accountant / Project Mgmt

ESTIMATING AND COMPILING BUDGETS

Successful budgeting is the result of balancing the program elements (quality/quantity) and schedule (time) with the forecasted costs (budget). Bates & Associates works as a team participant with our clients to develop projects from concept to construction, keeping the project triangle balanced (see diagram below). The programming process provides for early identification of budget, scope of work, and the clarification of quality/value expectations. This requires systematic budget management.



the project triangle

The best method we have to keep design and budget balanced during project development is to formalize the budget early and to make it the guideline for future decisions. Prioritized goals and objectives during the programming process help separate wants from necessities, while involving the client in a collaborative process of refinement.

An aspect that has drastically aided Bates in maintaining accurate budgets throughout each of our projects is our shift to Building Information Modeling (BIM). We are leaders in BIM Technology, and with this technology we have been able to greatly improve cost control and limit changes during the construction phase. Through Integrated Project Delivery processes and our use of the Revit software system, conflicts of systems and technical details have been significantly diminished and have allowed our recent projects to be constructed with few or no change orders.

INITIAL BUDGET VS. FINAL COST EXAMPLES

Project	Initial Budget	Final Cost
OTC Waynesville Education Center	$3,700,000	$3,718,200
Linn State Technical College - Vehicle and Power Center	$15,000,000	$15,000,000
OTC Richwood Valley Campus - Life Science & Tech. Center	$9,300,000	$9,300,000
Early Childhood Education Center	$2,000,000	$1,700,000
CoxHealth Meyer Orthopedic Center	$2,700,000	$2,900,000
Linn State Technical College - Information Technology Center	$12,800,000	$12,800,000

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BIM TECHNOLOGY WITH EMPHASIS IN REVIT

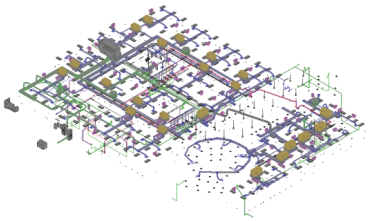
Bates is a leader in the use of technology to design and construct the best possible facilities for our clients. While many architects are reluctant to adapt to transforming technology, Bates embraces it! Building Information Modeling (BIM) Technology has significantly improved the methods in which buildings are designed, communicated, and analyzed. BIM has proven to provide outstanding benefits to Owners, resulting in high-quality facilities which are constructed faster with reduced costs versus traditional design methods. At Bates, our goal is not just to claim we use BIM technology, but to set the industry standard for how it is implemented.

3D Building Information Modeling (BIM) via Autodesk Revit

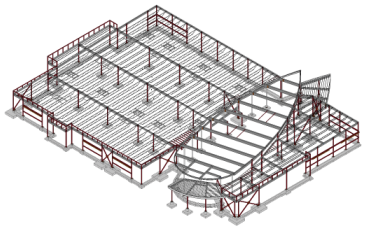
Bates is currently using Revit 2016 as a standard project delivery tool for all projects. We have developed standards and templates allowing us to quickly and efficiently collaborate with our consulting engineers in producing multi-disciplinary, fully coordinated BIM models. All of Bates production staff is Revit-capable and several of our key BIM personnel have achieved Revit Certification through Autodesk and CM-BIM Accreditation through Associated General Contractors of America. Our key BIM staff attends Autodesk University annually to learn about the innovative uses of BIM and to bring the best of cutting edge technologies and benefits to our clients.

Since the integration of BIM and Revit as a production tool, we have observed the following tangible benefits for our Clients:

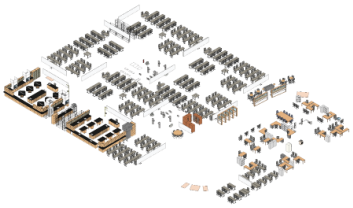
- Enhanced project understanding, communication and visualization - our clients know exactly what they will receive.
- Improved understanding of client needs - clients can communicate their needs quickly and easily.
- Improved coordination between the project team and streamlined coordination of Owner Equipment.
- Ability to incorporate design input from contractors and fabricators in CM, IPD and Design-Assist Projects.
- 3D presentation and discussion at prebid conferences to improve project understanding by subcontractors (in traditional Design-Bid-Build projects).
- More competitive bid pricing due to increased project understanding, decreased project ambiguities, lower risk of bid omissions, and increased contractor bid confidence.
- Reduction of RFIs, change orders, and submittal processing time as a result of well-coordinated, clash-detected 3D design models.
- Accelerated construction schedule due to reduction of conflicts and increased project understanding.
- Superior quality of the end-product as a result of clear expectations set by the 3D models.



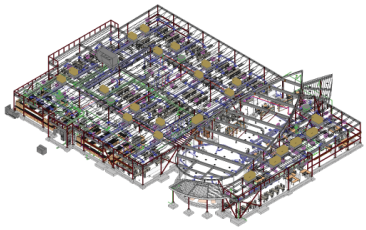
Mechanical Systems



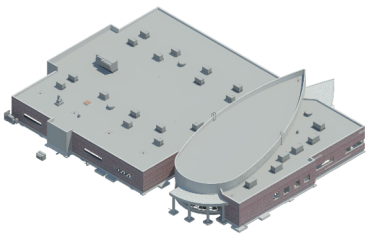
Structural Systems



FF&E Systems



All Building Systems



Overall Building Model

BIM TECHNOLOGY WITH EMPHASIS IN REVIT CONTINUED

Clash Detection Via Navisworks Manage

Clash Detection is the process of identifying conflicts (clashes) between the project team's individual model files when combined to create the entire building model. Clash Detection is probably the single most tangible benefit of BIM we provide for all of our projects - ***eliminating clashes in the model equals eliminating change orders in the field.***

Bates performs Clash Detection at all major milestones of the project to ensure there are no conflicts between individual engineering and construction systems.

Work and Collaborate in the Cloud

At Bates we use the latest in cloud-based data technology to allow entire project teams to work and collaborate in the most efficient methods available. Using Autodesk 360 Project Hub (A360), the A/E project team along with the Owner's team can view and share project related data, communicate with other members, navigate and comment on current Revit models, and orbit 3D model views on PCs, tablets, and mobile devices. With Autodesk Collaboration for Revit (C4R), project model data resides in the cloud where the project team can synchronize efforts between disciplines more effectively with live model data always at their fingertips. C4R uses intuitive tools to facilitate ongoing coordination and communication between the project and owner teams.

Enhanced Project Visualization Tools

Our clients can easily 'walk' or 'fly' through a rendered and furnished 3D model of their facility in real time. Taking it another step further, Bates can show clients rendered and furnished models through an immersive virtual reality environment. Using the latest in virtual reality headset technology, it's the closest experience available to actually walking through your real facility!

Lifecycle BIM and Facilities Management Services

Bates can assist in the development of a client-specific Lifecycle BIM Execution Plan, describing in detail the workflow and processes from Planning and Design, into Construction and Fabrication, and culminating into Operations and Maintenance.

When applying a full lifecycle BIM solution at the start of a project, we (can) use a standard client-specific library of predesigned modules to incorporate into a (proposed) project from the earliest schematic stage. These modules will incorporate schemes/layouts, specifications, cost, asset, maintenance, and other parameters important to our client for facilities management and operation. As design progresses, more information is populated into the model with the goal of achieving Level of Development (LOD) 350 per 2014 BIM Forum LOD Specification for all Building Systems, and a goal of LOD 400 BIM Models at the end of construction. When construction is complete, we enter the final phase of facilities/asset management where all BIM models are federated and translated into an easy-to-use, cloud-based software tied to an existing BMS/CMMS/CAFM system of choice (if applicable).

The Building Information Modeling-to-Facilities Management or (BIM-FM) process includes careful progression and workflow planning. This stage should be discussed at the very beginning of project planning. Subject to the BIM-FM goals identified early in the project, the stage requires the appropriate design and construction team as the process is collaborative in nature and does not exist in any individual silos.

REFERENCES

bates

Wes Holland
Director of Development
Reliance Health Care
824 Salem Rd. Suite 120
Conway, AR 72034
(501) 932-0050
wes@reliancehealthcare.com

PROJECT:
Primrose 120 bed skilled nursing facility

JP Roberts
General Manager
Vandivort Hotel
305 E. Walnut St.
Springfield, MO 65806
(417) 851-5084
jroberts@hotelvandivort.com

PROJECT:
Historic, LEED Gold Certified Vandivort Hotel Renovation

Dana Comstock
Superintendant of Schools
Chadwick Public Schools
7090 St. Hwy 125 S.
Chadwick, MO 65629
(417) 634-3588
comstockd@chadwick.k12.mo.us

PROJECT:
Chadwick FEMA Shelter

Joe Ruddell
Market President
1450 E. Zion Rd.
Fayetteville, AR 72703
479-316-0361
jruddell@mygenerations.bank

PROJECT:
4,000 sf Bank Facility currently in design phase

Curtis Jared
President
Jared Enterprises
2870 S. Ingram Mill Rd.
Springfield, MO 65804
(417) 887-7900
cjared@jaredenterprises.com

PROJECT:
Multiple land development multi-tenant projects

PENDING CLAIMS

bates

PENDING CLAIMS

Bates has ZERO pending or ongoing administrative or judicial proceedings material to its business or finances, including, but not limited to litigation, consent orders, or agreements with state or federal regulatory agencies, and any claims, whether past, current or pending, that involve work similar to the work sought by this RFQ.